
Investor Relations Practice Course: Disclosure, Messaging and Investor Meetings

28 December 2026 – 1 January 2027
New York





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Programme Summary

Investor relations practice is the subject of this one-week training course for heads of investor relations, finance chiefs and communication leaders of listed or listing companies at strategic level, ending in an investor relations plan for one company. Companies often speak to investors through separate teams, so the equity story, disclosures and meeting answers drift apart. The programme moves from the equity story and audience map to disclosure discipline, results messaging, investor meetings and analyst contact. Mars Training Centre UK delivers this programme on investor relations practice to mixed-organisation cohorts.

The Business Case

Investors form a view of a company from a small number of contacts: the results release, the earnings call and the meetings that follow. Leaders who agree one story, control what is said and when, and record what investors ask can keep the market view close to the company's own and respond calmly when results depart from expectations.

- Market Perception: Becomes steadier as messages are consistent across documents, calls and meetings.
- Disclosure Risk: Falls as release timing and wording follow a written discipline.
- Investor Confidence: Strengthens as questions are answered from a prepared and reviewed evidence base.

Principles and Evidence Base

- Two-Way Investor Communication: Treats investor relations as information passed out and market feedback brought back in, used in Sessions 1 and 4.
- Selective Disclosure Principle: Holds that material information reaches the market together rather than to chosen listeners, used in Session 2.
- Earnings Call Structure: Orders a cautionary statement, management review of results and outlook, then questions, used in Session 3.
- Equity Research Process: Explains how analysts reach ratings and target prices from fundamental analysis, used in Sessions 3 and 4.

Intended Participants

- Investor relations leaders who answer to the finance chief for the company's contact with the market.
- Finance chiefs who present results and guidance to investors and analysts.
- Corporate finance leaders who prepare the company for a listing or a capital raise.
- Communication leaders who align investor messages with press and website content.



Typical settings include listed industrial groups, banks, utilities and technology companies preparing for a listing.

Learning Outcomes

1. Participants will be able to construct an equity story that links strategy, financial results and risks.
2. Participants will be able to classify investors and analysts by interest, holding style and influence.
3. Participants will be able to evaluate planned statements against a selective disclosure checklist.
4. Participants will be able to design an earnings call script and a prepared question bank.
5. Participants will be able to prioritise investor meetings and diagnose patterns in investor feedback.
6. Participants will be able to justify an investor relations plan to the executive team and the board.

Programme Structure

Day 1: Investor Relations Practice: Equity Story and Audience

What story does the company tell, and who needs to hear it?

- Equity Story Outline
- Investor Audience Map
- Shareholder Register Analysis
- Peer Comparison Sheet
- Function Charter

Day 2: Disclosure and Market Information

What may be said, to whom and at what time?

- Disclosure Calendar
- Selective Disclosure Checklist
- Inside Information Log
- Results Release Template
- Cautionary Statement Wording

Day 3: Results Messaging and Earnings Calls

How are results turned into clear messages and a call that holds up under questions?

- Key Message Grid
- Earnings Call Script
- Question and Answer Bank
- Guidance Language Review
- Preannouncement Decision Tree



Day 4: Investor Meetings and Analyst Contact

How are one-to-one meetings, roadshows and analyst contact planned and learned from?

- Roadshow Plan
- Meeting Briefing Pack
- Analyst Estimate Tracker
- Investor Feedback Log
- Perception Study Summary

Day 5: Investor Relations Plan for One Company

Do the earlier tools make one plan that the company can run?

- Applying the Session 1 Equity Story Outline
- Testing the Session 2 Disclosure Calendar
- Reviewing the Session 3 Question and Answer Bank
- Checking the Session 4 Investor Feedback Log
- Completing the Investor Relations Plan

Methodology

The programme uses a structured exercise built on one prepared company case with a results release, a draft presentation, a shareholder register and a set of analyst questions. Participants decide each step, record reasons in a common format and compare results in small groups before applying the same tools to their own company.

- Suggested activity: Rewriting a results headline so that it matches the equity story.
- Suggested activity: Rehearsing an earnings call question round with a challenging analyst.
- Suggested activity: Sorting a list of investors by interest and planning the first contact.

Capstone Output

Each participant completes an investor relations plan for one company. It holds an equity story outline, an audience map, a disclosure calendar with a statement checklist, an earnings call script with a question bank and a meeting and feedback schedule. The plan is used at work to align executives before the next results date and to brief the board.

Frequently Asked Questions

Is investor relations practice suitable for finance leaders new to investor contact?

Yes. Investor relations practice is taught through a worked company case and templates. It assumes some experience of financial reporting or corporate communication, but no earlier investor relations role.



Which methods does investor relations practice rest on?

Investor relations practice rests on two-way investor communication, the selective disclosure principle, the structure of an earnings call and the equity research process.

How is the plan from investor relations practice used at work?

You use the investor relations plan to align executives before results, set the disclosure calendar and schedule meetings and feedback reviews for the year ahead.

How does investor relations practice differ from general corporate communication?

Investor relations practice teaches how to build an equity story, control disclosure and handle analysts and investors, while general corporate communication concentrates on press, employee and public messaging.